



ABOUT THE FIRM

This large institutional asset manager is part of a private bank and financial services company based in Europe. They use their strong expertise in thematic equities, emerging markets, and multi-asset strategies to manage more than \$700 billion in assets. They are committed to sustainability and proposing responsible products and services to their clients.



THE CHALLENGE

- Quantify company industry revenue exposure
- Improve ESG workflows
- Follow client requirements for reporting and regulations



THE SOLUTION

- Implement FactSet’s RBICS with Revenue for ESG profile analysis
- Receive data through various channels
- Analyze more granular, high-quality data when compared to previous provider



THE RESULTS

- Enhance proprietary ESG scoring model
- Strengthen long-term commitment to sustainable investments
- Explore additional opportunities with FactSet data

Major Institutional Asset Manager Enhances Multiple ESG Processes with FactSet Company Revenue Exposure Per Industry Data

Firm’s transition to FactSet unlocks new efficiencies for ESG workflows.

THE CHALLENGE

An institutional asset management firm’s thematic and quantitative teams struggled to compute company-level ESG profiles. Combining disparate datasets from multiple sources resulted in a lack of relevant information, making it nearly impossible to aggregate figures into client reports to understand specific ESG taxonomy.

The firm’s management team also wanted to improve its overall ESG workflows, such as research, daily analysis, production, investment processes, client reporting, and regulation. They required transparency into how much revenue a company generates from each industry to which it’s exposed. The firm, already a FactSet client using the FactSet Workstation, reporting tools, and data feeds, formerly used a competitor for their ESG analysis. They were unsatisfied and chose to explore other options.

With more relevant and valuable insights, the firm strengthened its long-term commitment to sustainable investments and fortified its sustainable analysis process for stock picking and portfolio construction.

THE SOLUTION

The firm selected FactSet RBICS with Revenue for its granular, high-quality data. To get there, they evaluated FactSet's data against their existing provider's offering, and quickly realized FactSet provided a more comprehensive and unique dataset. FactSet RBICS with Revenue normalizes non-standardized business segment reports by mapping companies' segment revenues to the granular sectors of RBICS, resulting in a quantified multi-sector participation tree. The data enables easy comparison, screening, and grouping across a universe of over 49,000 companies, across 12 anchor sectors, six levels of depth, and over 1,700 individual sector groups.

The firm uses FactSet RBICS with Revenue data to understand company-level ESG profiles and scores, define their investment universes, report aggregated footprints of their portfolios, and reference indices in internal and external reports. The firm's ESG/sustainable and reporting teams use the data to benchmark against the European Sustainable Finance Disclosure Regulation. Users across the firm leverage the data to power their research, quantitative analysis, portfolio management, equity analyst, production, reporting, and regulation workflows. Each team accesses critical information through the flexible delivery methods of its choosing, including Snowflake and via flat files sent to FTP/SFTP servers.

THE RESULTS

A smooth enterprise-wide implementation allowed the firm to see an immediate impact across its teams. Leveraging FactSet RBICS with Revenue, the firm enhanced their proprietary ESG scoring model. With more relevant and valuable insights, they strengthened their long-term commitment to sustainable investments and fortified their sustainable analysis process for stock picking and portfolio construction.

Users across the firm are now better able to meet their client and regulatory requirements with FactSet's robust data and reliable, automated reports. The firm is using FactSet data to explore additional opportunities.

DISCOVER SOLUTIONS

FactSet creates data and technology solutions for investment professionals around the world, providing instant access to financial data and analytics that investors use to make crucial decisions.

RBICS with Revenue

Reveal the true sector exposures of a company, index, or portfolio.

GET STARTED

ESG Investing

Accelerate your ESG journey with extensive data and best-in-class analytics.

GET STARTED